



October 15, 2015

MEMORANDUM FOR RECORD

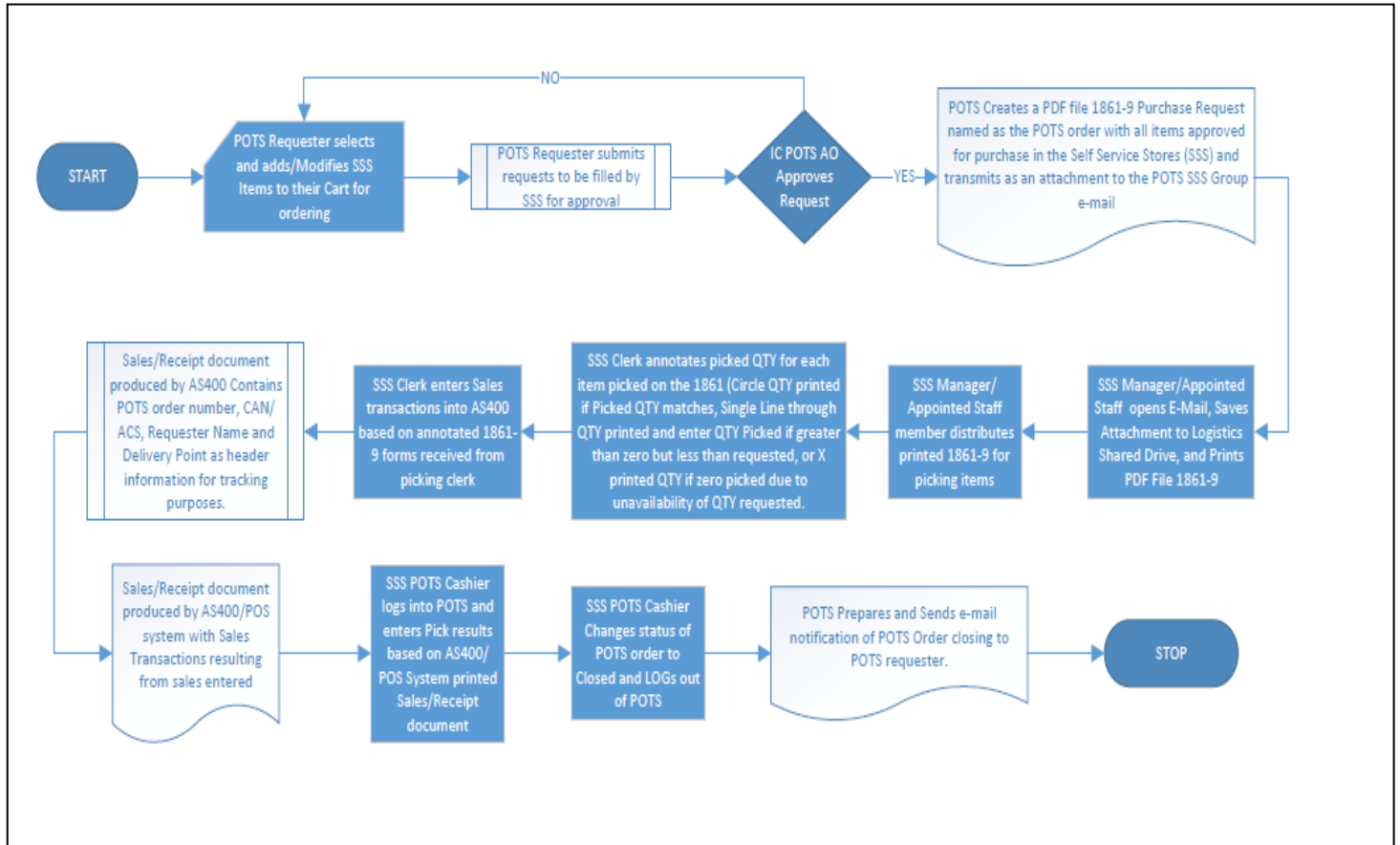
SUBJECT: Letter of Instruction (LOI) to receive and process Purchase Online Tracking System (POTS) orders at SSS 10.

1. Purpose: The purpose of this LOI is for the NIH-SC POTS system to outline procedures for receiving and processing POTS orders and provide guidance on what to do in the event stocks are not on hand.

2. Definition: The POTS System is an alternate means of ordering supplies to support the NIH's scientific mission. POTS is a centralized ordering system that is comprised of a number of peripheral components that ties into the NBS accounting system. There are varying types of access, and permission levels as outlined in the end user manual (EUM).

3. Scope: This LOI is applicable to all NIH-SC users and employees who need to review data pertaining to orders placed and for determining stock positioning.

4. Procedures: When a supervisor determines that a user or requestor for POTS access needs permissions to POTS and what roles the user will perform, the supervisor should notify the NIH-SC, POTS coordinator in writing with a cc to the supervisor of Business Operations including the requested permissions. Figure 1 below dictates the entire POTS process that must be followed from start to finish.



Legend
AO – Administrative Officer
BA – POTS Budget Approver
BO – POTS Business Office
PC – POTS Cashier
PI – POTS Approver
POS – Point of Sale System
PR – Purchase Request
SSS – Self Service Store
SSSC – Self Service Store Clerk
SSSS – Self Service Store Staff

Figure 1

POTS Role Descriptions

AO – Administrative Officer :

BA – POTS Budget Approver: This user approves/rejects purchase card buys for POTS users assigned to him/her.

BO – POTS Business Office:

PC – POTS Cashier: Receives and processes orders within POTS

PI – POTS Approver: Approves requisitions placed within POTS.

POS – Point of Sale System: Receives the orders and sends required sales data daily to NBS.

PR – Purchase Request: A buyer-generated document that authorizes a purchase transaction.

SSS – Self Service Store: The establishment (Store 10) where NIH merchandise is sold.

SSSC – Self Service Store Clerk: The individual employed, in the store, to provide customer support, restock shelves and process orders and sales.

SSSS – Self Service Store Staff: The individual employed, in the store, to provide customer support, restock shelves and process orders and sales.

Processing an NIH-SC order

1. Receiving an Order: The NIH-SC requires a POTS e-mailed purchase order through POTS to process an order for shipment.

2. When the Sales Order is received:

- a. The Store Manager reviews the order received on a 1861-9 form created by POTS.
- b. Store Manager prints 3 copies of the customer's 1861-9.
- c. If the order is \$100.00 or more the customer may identify the preferred method in POTS as being a pick up or delivery.
- d. Store Clerk determines the quantity on-hand of each item on the PO and picks the item from the appropriate location in the store and annotates sales slip.
- e. Store Clerk places one copy of the sales sheet into the box designated for the customer.
- f. The remaining two sheets are provided to the cashier.
- g. The Cashier logs into POTS to enter pick results and changes the status of the PO to closed once completed.
- h. Upon completion of inputting sales the clerk will then print two copies of receipt by attaching one to the sales sheet and return one to the store clerk.

3. Customer pick up: PO is under \$100 or customer elects pick up option.
 - a. Customer has up to 48 hours to pick up order from store once email is received which states “order is ready for pick up”.
 - b. Customer arrives to Store with POTS order number and sees store cashier.
 - c. Store cashier will notify store clerk customer is available to pick up POTS order.
 - d. Form 1861-9 showing quantity filled and Point of sales system Receipt is presented to customer.
 - e. Joint inventory is conducted between store clerk and customer.
 - f. Once all items are verified, customer will sign the Point of sales system Receipt.
 - g. One copy of Form 1861-9 and Point of sales system Receipt will be given to the customer as well as items ordered.
 - h. Signed Point of sales system Receipt and Form 1861-9 is returned to cashier for filing.
(End of Transaction)











4. Customer delivery: PO over \$100 and customer elects delivery option.
 - a. Store clerk (driver) has up to 48 hours to deliver POTS orders to the customer.
 - b. Store clerk arrives to location listed on Form 1861-9 and speaks directly with customer who placed POTS order. If customer is not available, the store clerk is authorized to speak with an individual from the direct office of customer.
 - c. Form 1861-9 showing quantity filled and Point of sales system Receipt is presented to customer.
 - d. Joint inventory is conducted between store clerk and customer.
 - e. Once all items are verified, customer will sign the Point of sales system Receipt.
 - f. One copy of Form 1861-9 and Point of sales system Receipt will be given to the customer as well as items ordered.
 - g. Signed Point of sales system Receipt and Form 1861-9 is returned to cashier for filing.
(End of Transaction)

Processing an NIH-SC order as Cashier:

1.The Cashier will navigate to ‘Cashier My Orders.’



2.Editing the ‘Filled’ quantity/adding item notes for each item: The Cashier will click the ‘edit’ icon for the item to modify, or click ‘Open Complete Item List’.

Action	Item Description	CAN	Item Status	Qty.	Filled	Unit	List Price	Discount Price	Sub Total	Detail
 	Battery, Size AAA, NSN 6135-00-826-4798, 4/Pg, 6 Pg/BX, 6 BX/Case Qty: 7655 PG, Unit Price: \$1.25	8320053	<div>Not Ordered</div>	1	1	PACKAGE	\$1.85	\$1.85	\$1.85	View
 	PURELL SANITIZER W/ ALOE GT-9674-12	8320053	<div>Not Ordered</div>	10	1	EACH	\$3.70	\$6.35	\$63.50	View
 	SHEARS, STRAIGHT 9 INCH	8320053	<div>Not Ordered</div>	200	1	EACH	\$19.45	\$19.45	\$3,890.00	View
 	PLIER SET-9 PIECE # 4PM19	8320053	<div>Not Ordered</div>	5	0	EACH	\$111.80	\$111.80	\$559.00	View
 	PLIER SET-9 PIECE # 4PM19	8320053	<div>Not Ordered</div>	5	0	EACH	\$111.80	\$111.80	\$559.00	View
							Total	\$5,073.35		
<div>Open Complete Item List</div>										

3. The Cashier can click update after modifying the 'Filled' quantity and enter any notes for the item.

Select CAN:		8320053 (dir)	
Expenditure Type/OC:			
*Item Description: (500 characters max.)		Battery, Size AAA, NSN 6135-00-826-4798, 4/Pg, 6 Pg/BX, 6 BX/Case Qty.: 7655 PG, Unit Price: \$1.25	
Item Notes		Item is in stock	

Qty.*	Filled	Unit *	Size of Unit	NSN # *	GSA Schedule#
1	1	PACKAGE		6135008264798	
		List Price	Discount Price		
		\$ 1.85	\$ 1.85		

Update

Cancel

4. Closing and order: Once the Cashier 'Saves' the order, the order status will be set to 'Closed'. In addition, an email notification will be sent through POTS to the Requester notifying them that the order is now closed.

Save

Cancel

5. **Changing the order status:** The Cashier can click ‘Change Status’ from the Order Details page.

POTS #: 15-000428
User Role: Cashier

Edit Order	Change Status	POTS Event History	Print Worksheet
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Order Status: Closed
Receiving Status: Not Received
NBS Status: Not Sent To NBS

6. The Cashier will click the desired order status.

Change Status

☐ Pending ☒ Closed

Submit **Cancel**

Viewing Cashier Orders:

7. The Cashier will navigate to ‘Cashier My Orders’ to view all NIHSC orders.

Administrator Cashier Vendors S

My Orders

1 2									
Emergency	POTS #	Requester	CAN	Vendor	Total	Apprv Date	Apprv By	AO Apprv Date	AO Apprv By
✓	15-000422	SHARVIRALA, Sridevi	8320053	NIH Supply Center	\$5,073.35	9/9/2015	SHARVIRALA, Sridevi	9/9/2015	SHARVIRALA, Sridevi
✓	15-000420	SHARVIRALA, Sridevi	8320053	NIH Supply Center	\$46.30	9/9/2015	SHARVIRALA, Sridevi	9/9/2015	SHARVIRALA, Sridevi
✓	15-000419	SHARVIRALA, Sridevi	8320053	NIH Supply Center	\$143.55	9/9/2015	SHARVIRALA, Sridevi	9/9/2015	SHARVIRALA, Sridevi
✓	15-000418	Johnson, David	2223222	NIH Supply Center	\$142.85	9/8/2015	Revil William	9/8/2015	Johnson, David

///Original Signed///
Gary Marquez
Chief, NIH Supply Center